

INPUT
Conférence du 31 mai 1991
Les Marchés des Logiciels
& Services en Europe
1990-1995

Hotel Royal Monceau
Paris

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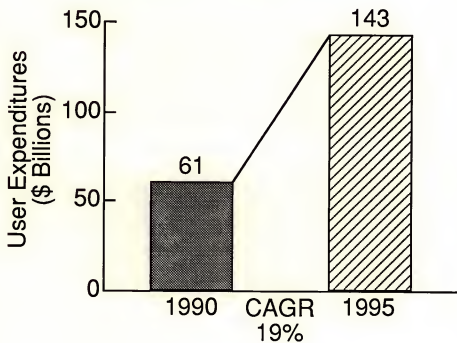
Panorama et Tendances des Marchés

**Peter Lines
Vice President
European Research**



Western Europe, 1990-1995

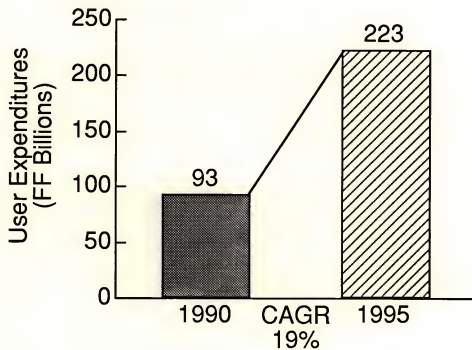
Software and Services





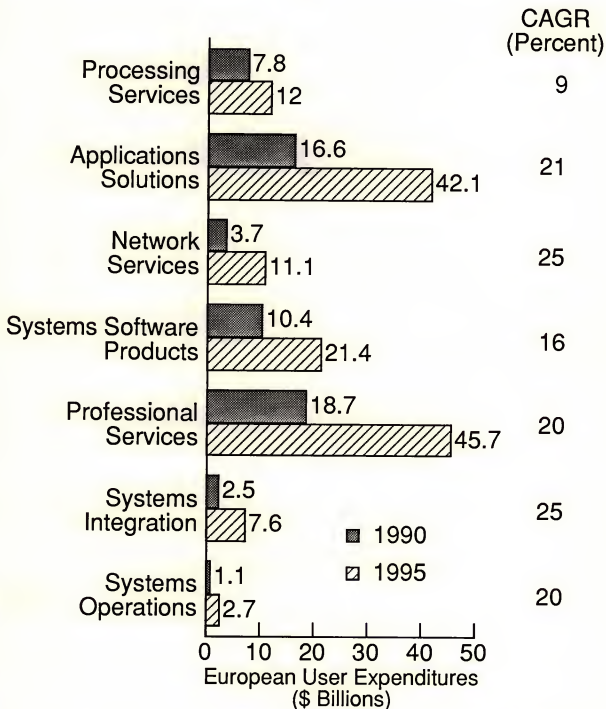
France, 1990-1995

Software and Services





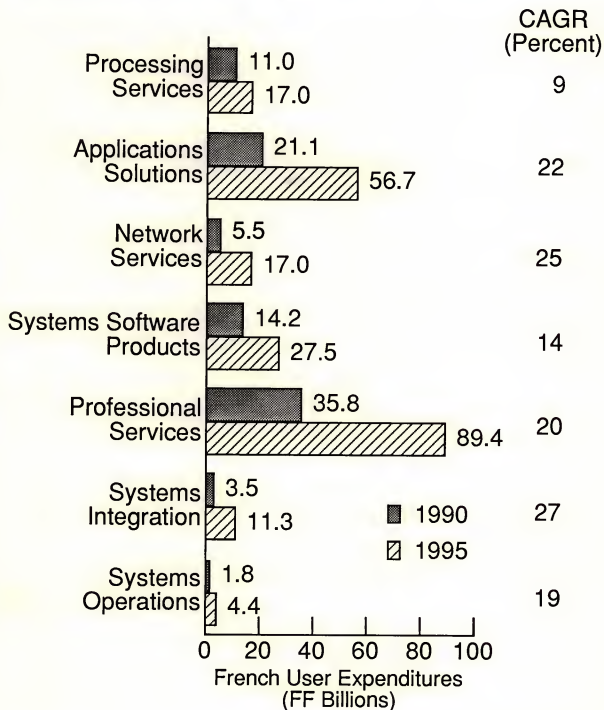
Computer Software and Services Markets by Delivery Mode, 1990-1995





France

Computer Software and Services Markets by Delivery Mode, 1990-1995





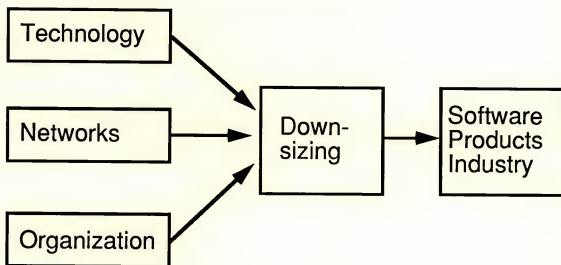
Western Europe

Leading Independent Vendors 1990 Software and Services

Rank	Vendor	Revenues (Est. \$M)	Market Share (%)
1	CGS	1060	2
2	Reuters	1050	2
3	Andersen	700	1

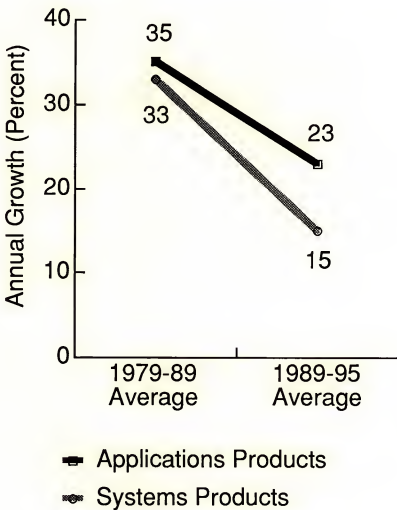


Downsizing Driving Forces





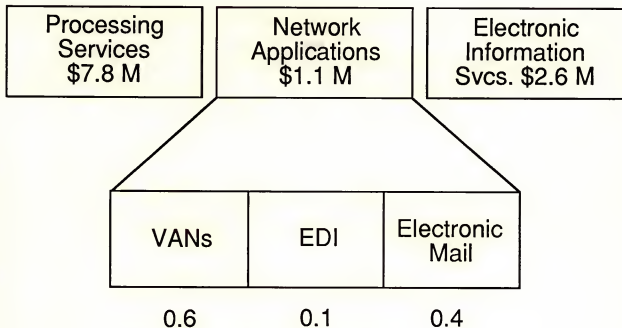
Systems Software Product Growth Declines In Western Europe





Western Europe

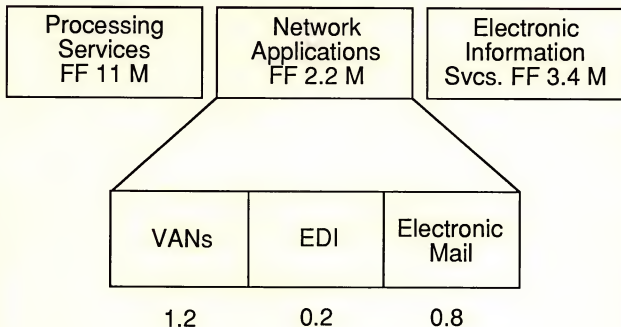
Market Sector Comparison, 1990





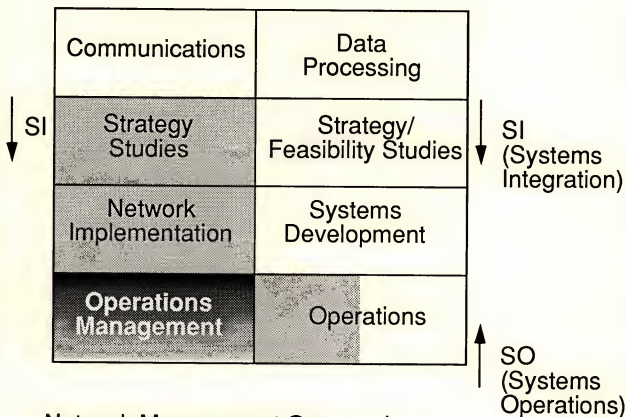
France

Market Sector Comparison, 1990







Network Management in Context



Network Management Outsourcing

-  Strong potential
-  Weaker potential



**Outsourcing is the
contracting of information
systems (IS) functions to
external vendors.**

Evolution of Outsourcing

Type of Product or Service	1970s	1990s
Applications Software	Applications Packages →	Applications Management
Professional Services	Consulting Contract Prog →	Systems Integration
Processing Services	Specific Proc Serv →	Systems Operations



Systems Integration, Western Europe

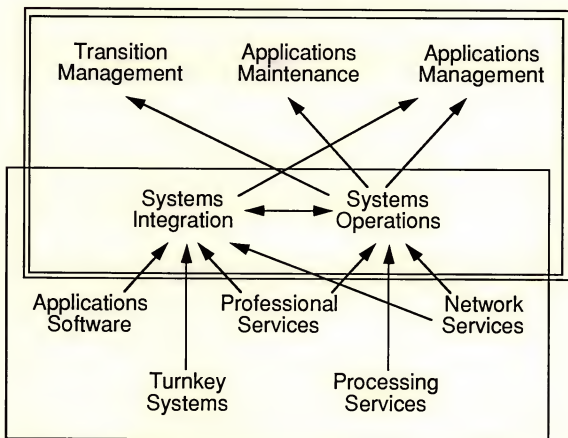
Management and IT Consultancy Congruence

- Andersen Consulting
- Meritus
- CGS/United Research
- CGS/Index Group



Outsourcing Developing Market Opportunities

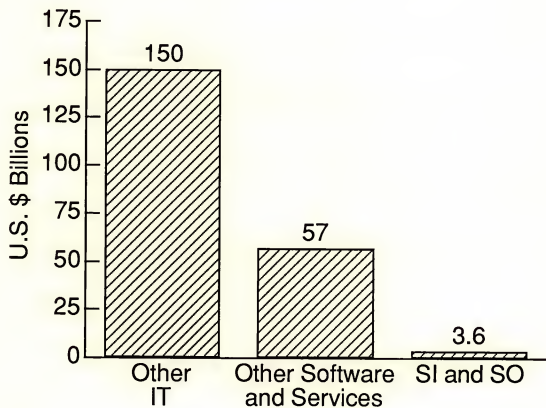
Systems Management Functions



Delivery Modes



Total IT Expenditure Western Europe, 1990



Total = \$216 Billion

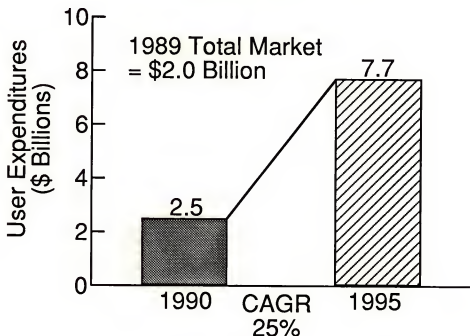


Challenges Offert par l'Intégration de Systèmes

**John Willmott
Consultant**

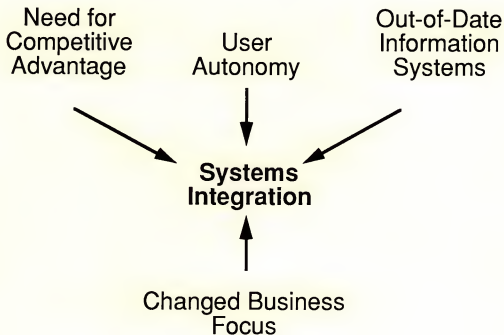


Western European Systems Integration Market 1990-1995





Systems Integration, Western Europe Driving Forces



Systems Integration, Western Europe Key Driving Forces: Vendor Perception

Factor	Level of Importance
Lack of in-house technical capability	Very High
Lack of in-house IS resources	High
Migration to open systems	Medium-High
Need to link heterogeneous equipment	Medium-High

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995. The public sector has become a major employer in the UK, and its growth has been a major factor in the overall growth of the economy.

The public sector has also become a major employer of women. In 1980, women made up 40% of the public sector workforce, and by 1995, this figure had risen to 50%. This increase in the number of women in the public sector has been a major factor in the overall increase in the number of women in the workforce.

The public sector has also become a major employer of people with disabilities. In 1980, people with disabilities made up 1% of the public sector workforce, and by 1995, this figure had risen to 3%. This increase in the number of people with disabilities in the public sector has been a major factor in the overall increase in the number of people with disabilities in the workforce.

The public sector has also become a major employer of people from ethnic minorities. In 1980, people from ethnic minorities made up 1% of the public sector workforce, and by 1995, this figure had risen to 3%. This increase in the number of people from ethnic minorities in the public sector has been a major factor in the overall increase in the number of people from ethnic minorities in the workforce.

The public sector has also become a major employer of people who are over 50 years of age. In 1980, people over 50 years of age made up 1% of the public sector workforce, and by 1995, this figure had risen to 3%. This increase in the number of people over 50 years of age in the public sector has been a major factor in the overall increase in the number of people over 50 years of age in the workforce.

The public sector has also become a major employer of people who are under 25 years of age. In 1980, people under 25 years of age made up 1% of the public sector workforce, and by 1995, this figure had risen to 3%. This increase in the number of people under 25 years of age in the public sector has been a major factor in the overall increase in the number of people under 25 years of age in the workforce.

The public sector has also become a major employer of people who are over 65 years of age. In 1980, people over 65 years of age made up 1% of the public sector workforce, and by 1995, this figure had risen to 3%. This increase in the number of people over 65 years of age in the public sector has been a major factor in the overall increase in the number of people over 65 years of age in the workforce.

The public sector has also become a major employer of people who are under 16 years of age. In 1980, people under 16 years of age made up 1% of the public sector workforce, and by 1995, this figure had risen to 3%. This increase in the number of people under 16 years of age in the public sector has been a major factor in the overall increase in the number of people under 16 years of age in the workforce.

The public sector has also become a major employer of people who are over 75 years of age. In 1980, people over 75 years of age made up 1% of the public sector workforce, and by 1995, this figure had risen to 3%. This increase in the number of people over 75 years of age in the public sector has been a major factor in the overall increase in the number of people over 75 years of age in the workforce.

Systems Integration, Western Europe Key Players in Buying Process

<div style="text-align: center;">Vendor type</div> <div style="text-align: center;">Player</div>	Equip. Vendors	Prof. Serv. Vendors	Mgmt. Consult.
Client board-level personnel	High	Medium	Very High
Head of information systems	High	Very High	Medium
Client middle management	Low	High	Medium

Systems Integration, Western Europe Vendor Targeting

- Major organizations
- Industries undergoing radical change
- Companies with highly distributed operations



Systems Integration, Western Europe Strengths and Weaknesses of Management Consultancies

Strengths	Weaknesses
High-calibre personnel	Expensive
Credibility with user top management	Sometimes overrun cost and timescales
Business consultancy skills	Looking for repeat business



Systems Integration, Western Europe Strengths and Weaknesses of Major Equipment Vendors

Strengths	Weaknesses
Stability	Business consultancy skills
High-calibre personnel	Lack of proven track record
Account management	Lack of independence
	Lack of development expertise/resources

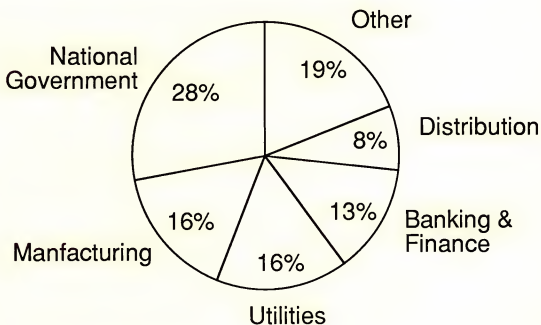


Systems Integration, Western Europe Strengths and Weaknesses of Professional Services Vendors

Strengths	Weaknesses
Relationship with IS management	Business consultancy skills
Project management skills	Perceived technical orientation
Implementation/technical skills	Lack of access to user top management



Industry Market Opportunities Systems Integration, Western Europe



1990 Total Market = \$2.5 Billion



Importance in Buying Process Computer-Integrated Manufacturing, Western Europe

User Personnel	Degree of Importance
Top management	High
Manufacturing management	Medium-High
IS management	Medium-High



Importance in Lead Generation Computer-Integrated Manufacturing, Western Europe

Vendor type Means of Lead Generation	Equip. Vendors	Prof. Serv. Vendors
Account Managers	High	Medium
New Business Sales Force	Medium	High
Collaboration Partners	Medium	High
External Consultants	Low	Medium



Vendor Issues: Alliances

- IBM and Coopers & Lybrand
- IBM Approved Industrial Systems Integrators
- Cincom "CIM Alliance" Programme
- ASK and EDS



Vendor Challenges Systems Integration, Western Europe

- Access to key decision makers
- Integration architecture
- Building key partnerships
- Open systems and product branding
- Profitability



Nouvelles Opportunités autour de la Maintenance des Logiciels Internes

**Roger Fulton
Consultant**

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ORIGINALS
MOVED TO
MEMAP 6/91

Operational Software Support (Software Maintenance)

- Support and maintenance of in-house developed software
 - Two-thirds of all software activity
 - Today the smallest outsourced sector
- Largest services opportunity of the 1990s
- Centred on management issues

INPUT

Categories of Software by Source

- Class A In-house developed
- Class B Custom/contracted
- Class C Application products
- Class D System products

INPUT

THE HISTORY OF THE

REIGN OF

CHARLES THE FIRST

BY

JOHN BURNET

OF

THE UNIVERSITY OF OXFORD

IN TWO VOLUMES

LONDON

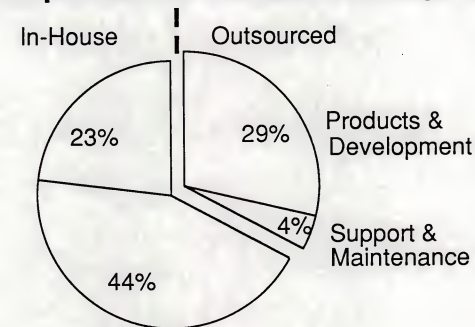
Software Maintenance Definitions

- Product vendor
 - Fixing faults in software product
- Services vendor
 - Keeping each client happy
- IS management
 - Everything done after software goes live

INPUT



European User Software Budgets



1990 Total: \$90 Billion

INPUT

1890. 1891. 1892. 1893. 1894. 1895. 1896. 1897. 1898. 1899. 1900.

1901. 1902. 1903. 1904. 1905. 1906. 1907. 1908. 1909. 1910. 1911.

1912. 1913. 1914. 1915. 1916. 1917. 1918. 1919. 1920. 1921. 1922.

1923. 1924. 1925. 1926. 1927. 1928. 1929. 1930. 1931. 1932. 1933.

1934. 1935. 1936. 1937. 1938. 1939. 1940. 1941. 1942. 1943. 1944.

1945. 1946. 1947. 1948. 1949. 1950. 1951. 1952. 1953. 1954. 1955.

1956. 1957. 1958. 1959. 1960. 1961. 1962. 1963. 1964. 1965. 1966.

1967. 1968. 1969. 1970. 1971. 1972. 1973. 1974. 1975. 1976. 1977.

1978. 1979. 1980. 1981. 1982. 1983. 1984. 1985. 1986. 1987. 1988.

1989. 1990. 1991. 1992. 1993. 1994. 1995. 1996. 1997. 1998. 1999.

2000. 2001. 2002. 2003. 2004. 2005. 2006. 2007. 2008. 2009. 2010.

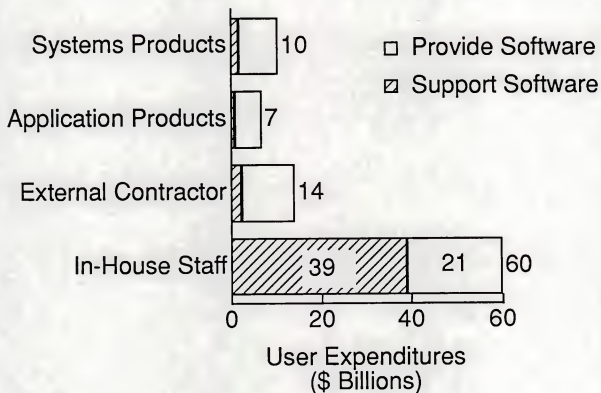
2011. 2012. 2013. 2014. 2015. 2016. 2017. 2018. 2019. 2020. 2021.

2022. 2023. 2024. 2025. 2026. 2027. 2028. 2029. 2030. 2031. 2032.

2033. 2034. 2035. 2036. 2037. 2038. 2039. 2040. 2041. 2042. 2043.

2044. 2045. 2046. 2047. 2048. 2049. 2050. 2051. 2052. 2053. 2054.

European User Software Budgets



INPUT



User Case Study Government Sector

Problem—Operational software support

- Improve user service/lower costs

Solution—Outsourcing

Benefits

- >50% cost savings on staff ~\$70 p.a.
- 8 full-time staff replaced by 4 part-time
- System life extended 5 years

INPUT



User Case Study Telecommunications Sector

Problem—Operational software support

- Free up staff and improve user service

Solution—Outsourcing

- Mix of in-house and third-party staffing

Benefits

- 19 staff released for new projects
- Call-outs reduced ten-fold
- Working practices adopted by client

INPUT



Operational Software Support Outsourcing Benefits

- Contracted quality of service for users
 - Better performance and reliability
 - Running costs known, and decreasing
- In-house staff released for new projects
- IS operational efficiency improved
 - Proven management techniques

INPUT

Operational Software Support Service Vendor Opportunities

- Support and maintenance contract
 - User service levels
 - Hand-over staffing and timing
 - Emergency services
 - Software maintenance/enhancement
 - Procedures/methods enhancement
 - Management control and reporting

INPUT



Operational Software Support Product Vendor Opportunities

- Management tools:
 - User service levels
 - IS resources
 - Software
- Software engineering tools:
 - CASE tools, whole life cycle
 - Reverse, re-engineering, conversion

INPUT



Conclusions

- Operational software support services
 - Untapped market opportunity
 - Total user spend ~\$44B
 - Less than 1% is outsourced
- Primary need is IS management skills rather than software engineering tools
- Natural fit in the systems operations market
- Strong vendor marketing is needed

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Peter Lines' Paris presentation.

EMF1X 219.

- Just this slide (attached)
is required, updated to
show 1990 revenues.

FROM: CAROL NICE

DATE: 23 MAY

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Project Charge Code: _____

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THE UNIVERSITY OF CHICAGO
CHICAGO, ILLINOIS
JANUARY 1900
TO THE PRESIDENT OF THE UNIVERSITY
FROM THE FACULTY
SIR,
We have the honor to acknowledge the receipt of your letter of the 10th inst. and in reply to inform you that the same has been forwarded to the proper authorities for their consideration.

Very respectfully,
Yours truly,
The Faculty
The University of Chicago
CHICAGO, ILLINOIS
JANUARY 1900

THE UNIVERSITY OF CHICAGO
CHICAGO, ILLINOIS
JANUARY 1900
TO THE PRESIDENT OF THE UNIVERSITY
FROM THE FACULTY
SIR,
We have the honor to acknowledge the receipt of your letter of the 10th inst. and in reply to inform you that the same has been forwarded to the proper authorities for their consideration.

5

Western Europe

Leading Independent Vendors 1989 Software and Services

1990

| Rank | Vendor | Revenues
(Est. \$M) | Market
Share (%) |
|------|----------|------------------------|---------------------|
| 1 | CGS | 1060980 | 2 |
| 2 | Reuters | 900 | 2 |
| 3 | Andersen | 700520 | 1 |

54MF-18

1050 INPUT

Notes

4/15/91

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INPUT

Selling Independent Vendors Software and Services



PETER LINES '

PARIS PRESENTATION.

Overheads please:

Title Slide - ya already have (in French).

- 1 E-MF-1
- 2 E-MF-1 with changes - see attached
- 3 MEMAP-PL-4
- 4 MEMAP-PL-4 with changes - see attached
- 5 E-MF-18+19 as one overhead.
- 6 MS-21
- 7 MEMAP-PL-17
- 8 E-NS-3 - remove box saying 'OTHER' N/A.
- 9 E-NS-3 - with changes see attached
- 10 SESMP-ML-17
- 11 DU-6
- 12 DU-18
- 13 see attached - sorry can't read the number!
- 14 MEMAP-PL-22
- 15 MEMAP-PL-23

MEMAP

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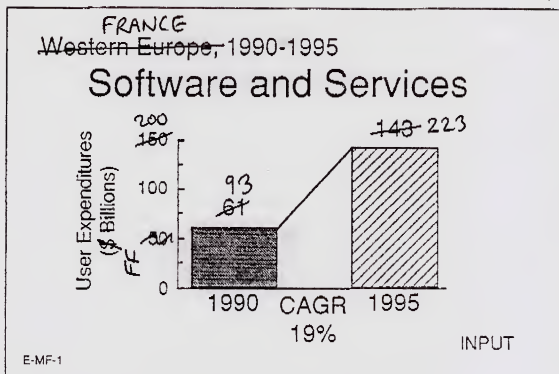
Panorama et Tendances
des Marchés

Peter Lines

Vice President European Research.



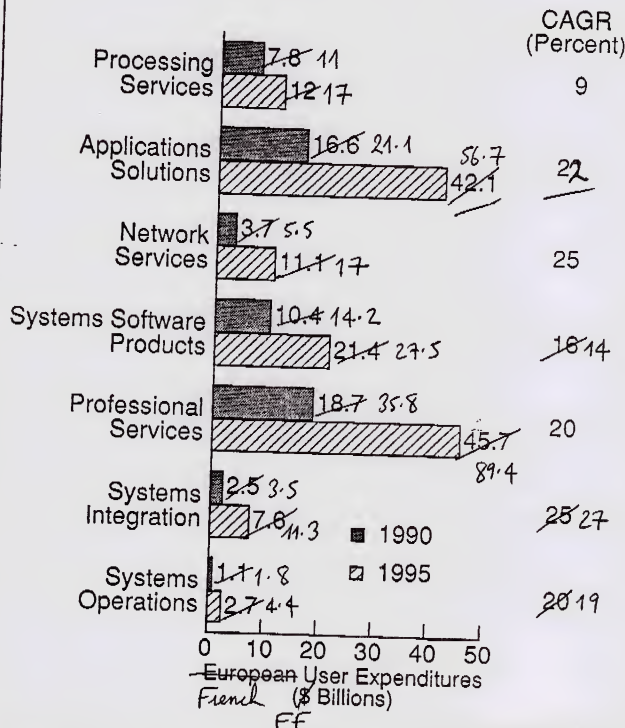
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Notes



Computer Software and Services Markets by Delivery Mode, 1990-1995



Computer Software and Services by Delivery Mode, 1990-1995



U.S. Information Services Industry

INPUT

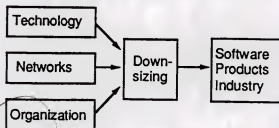
MS-19

Opportunities in a Changing Market

INPUT

MS-20

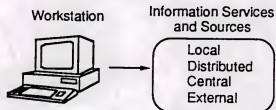
Downsizing Driving Forces



MS-21

INPUT

Window to the Information Network



MS-22

INPUT

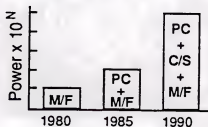
Application Distribution

| Type | Location | | |
|--------------|------------|-----------|---------------|
| Personal | 1980 | 1985 | 1990-1995 |
| | Main-frame | PC | PC |
| Departmental | Main-frame | Mainframe | Client/Server |
| | Main-frame | Mainframe | Mainframe |

MS-23

INPUT

Computing Power

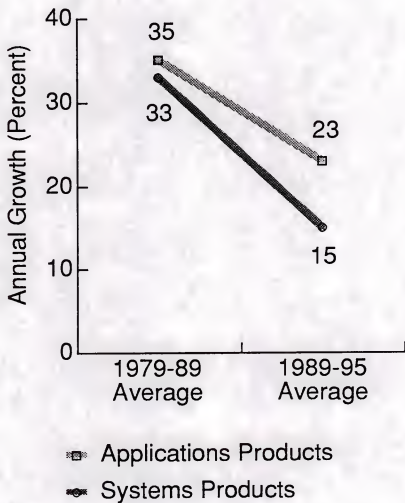


MS-24

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Systems Software Product Growth Declines In Western Europe

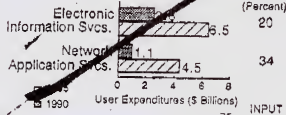




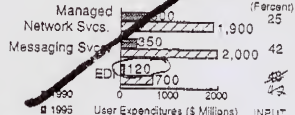
slight rounding
errors but
basically o.k.

Western Europe Network Services Market

1990-1995

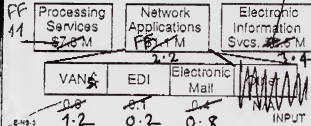


Western Europe Network Application Services Market, 1990-1995



check
table

Western Europe - FRANCE Market Sector Comparisons, 1990



Network Application Services Western Europe Leading Vendors, 1989

| Rank | Company | Est. Revenues (\$ M) |
|------|----------------|----------------------|
| 1 | Teles | 100 |
| 2 | Infonet | 80 |
| 3 | BT/Tymnet | 80 |
| 4 | GSI | 70 |
| 5 | France Telecom | 60 |

INPUT

Electronic Information Services Western Europe

Leading Vendors, 1989

| Rank | Company | Est. Revenues (\$ M) |
|------|----------|----------------------|
| 1 | Reuters | 700 |
| 2 | Exel | 250 |
| 3 | Teletype | 200 |
| 4 | DAB | 140 |
| 5 | Telekurs | 100 |

INPUT

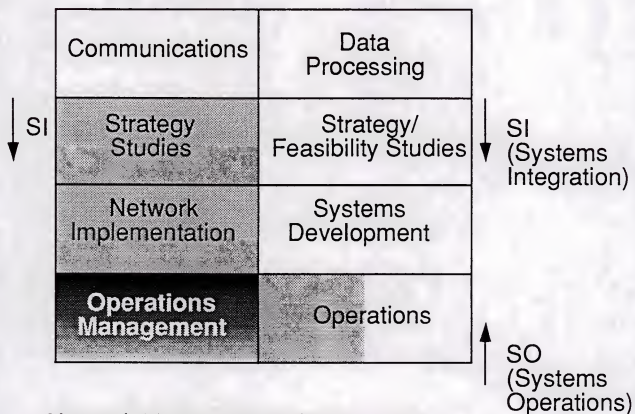
Western Europe Electronic Information Services, 1990

- One million users
 - 1,000 data bases
 - 100 on-line vendors
- INPUT



is it possible to left justify
the numbers?



Network Management in Context



Network Management Outsourcing

-  Strong potential
-  Weaker potential

INPUT



What is it?

Why is it becoming
a major factor?

OU-1

INPUT

Beyond Products: Service-Based Strategy

HBR March/April 1990

OU-2

INPUT

Key Findings

- Value added from services
- Technology enhances services
- Services enable competitive differentiation

Source: HBR Article

OU-3

INPUT

Recommendations

- Focus on core services
- Outsource other activities

Source: HBR Article

OU-4

INPUT

Outsourcing

- Outsource non-competitive activities
- Outsourcing builds flexibility
- Outsourcing allows focus

Source: HBR Article

OU-5

INPUT

Outsourcing is the
contracting of information
systems (IS) functions to
external vendors.

OU-6

INPUT



Outsourcing Vendors

- Approaches differ greatly
- Variety of capabilities needed
- Partnerships/alliances result

OU-13

INPUT

Corporate Organization

- IT and IS will change the organization
- How will it operate?

OU-14

INPUT

Corporate Organization

- People
 - How many?
 - When?
 - What skills?

OU-15

INPUT

Transition Management

- Dramatic growth potential
- IS and non-IS components

OU-16

INPUT

Potential for revolution is there.

Forecasts are based on evolution.

OU-17

INPUT

Evolution of Outsourcing

| Type of Product or Service | 1970s | 1990s |
|----------------------------|--------------------------|-------------------------|
| Applications Software | Applications Packages | Applications Management |
| Professional Services | Consulting Contract Prog | Systems Integration |
| Processing Services | Specific Proc Serv | Systems Operations |

OU-18

INPUT



Typical Groupe Bull SI Projects

| Client | Project |
|-----------------|---|
| Ansaldo (I) | Plant automation |
| DSS (U.K.) | OSI network |
| Post Office (F) | Workstation network
for financial services |

E-10

INPUT

Systems Integration, Western Europe Vendor Targeting

- Major organizations
- Industries undergoing radical change
- Companies with highly distributed operations

E-11

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Systems Integration, Western Europe

Management and IT Consultancy Congruence

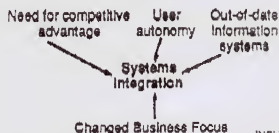
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- Merit
- CGS/United Research
- CSC/Index Group

E-12

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Systems Integration, Western Europe

Driving Forces



E-13

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6/1/91

2

1. The first step in the process of the cell cycle is the G₁ phase. During this phase, the cell grows and prepares for division. The cell cycle is a continuous process that repeats itself over and over again.



3. The third step in the process of the cell cycle is the G₂ phase. During this phase, the cell grows and prepares for division. The cell cycle is a continuous process that repeats itself over and over again.

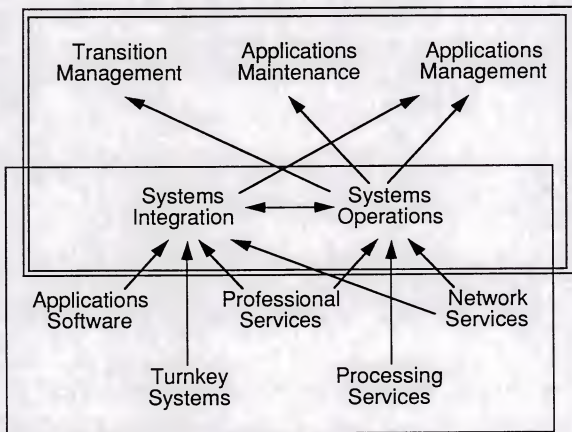


5. The fifth step in the process of the cell cycle is the G₁ phase. During this phase, the cell grows and prepares for division. The cell cycle is a continuous process that repeats itself over and over again.



Outsourcing Developing Market Opportunities

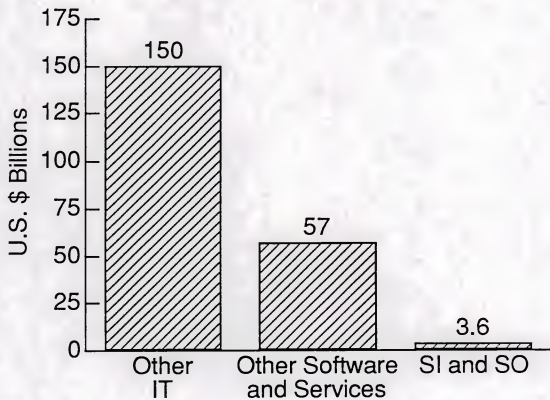
Systems Management Functions



Delivery Modes



Total IT Expenditure Western Europe, 1990



Total = \$216 Billion



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DESCRIPTION:

Cheryl,
Only two minor changes

1. The accent on Integration
2. Any way of indicating the Y-axis
on slide 2.

Thanks,
John

FROM: JOHN WILLMOTT

DATE: 22.5.91

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Project Charge Code: _____

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Challenges Offert par l'Intégration de Systèmes

**John Willmott
Consultant**

SE&MP-JW 8/91-1

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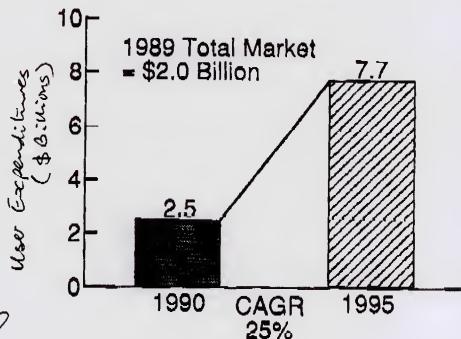
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Christmas Order 621
Integration & Systems

John Willmott
(Consultant)

1993

Western European Systems Integration Market 1990-1995



SESMP-JW 5/91- 2

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Western Mountain Systems Information Market 1995-1996



TITLE PAGE

presentation ③.

Challenges Ozzent par
l'Intégration de Systèmes

John Willmott

Consultant.

Single like
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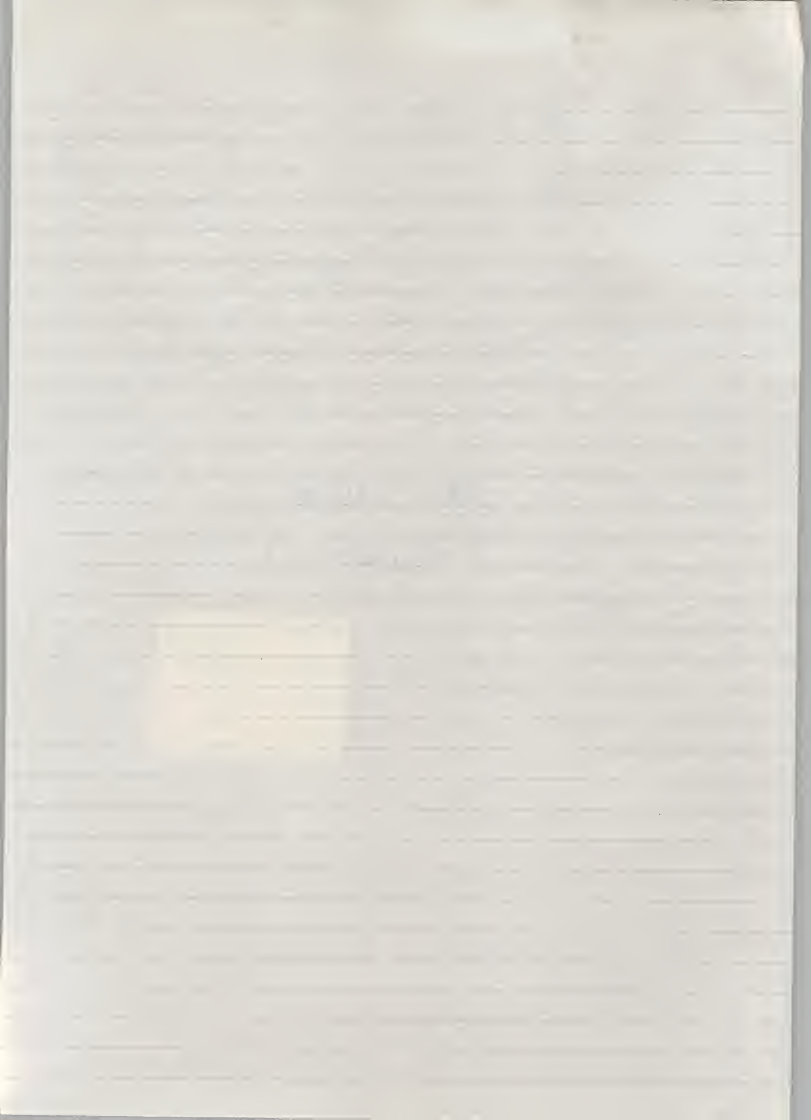
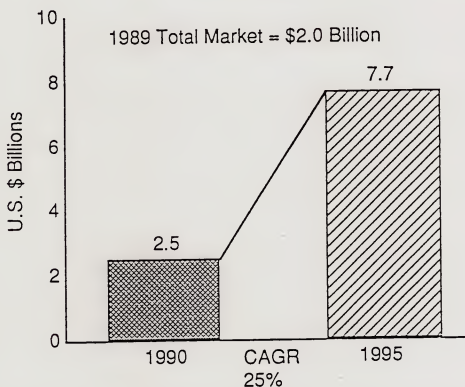


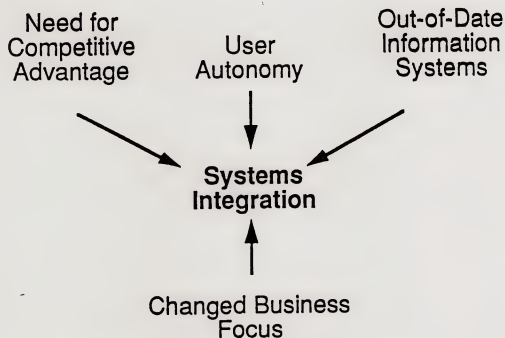
Exhibit III-1

Western European Systems Integration Market, 1990-1995

Western European Systems Integration Market
1990-1995



Systems Integration, Western Europe Driving Forces





(4)

Systems Integration, Western Europe Key Driving Forces: Vendor Perception

| Factor | Level of
Importance |
|--|------------------------|
| Lack of in-house
technical capability | Very
High |
| Lack of in-house
IS resources | High |
| Migration to open
systems | Medium-
High |
| Need to link
heterogeneous equipment | Medium-
High |



Systems Integration, Western Europe Key Players in Buying Process

| <div>Vendor
type</div> <div>Player</div> | Equip.
Vendors | Prof. Serv.
Vendors | Mgmt.
Consult. |
|--|-------------------|------------------------|-------------------|
| Client board-level
personnel | High | Medium | Very
High |
| Head of information
systems | High | Very
High | Medium |
| Client middle
management | Low | High | Medium |



Systems Integration, Western Europe Vendor Targeting

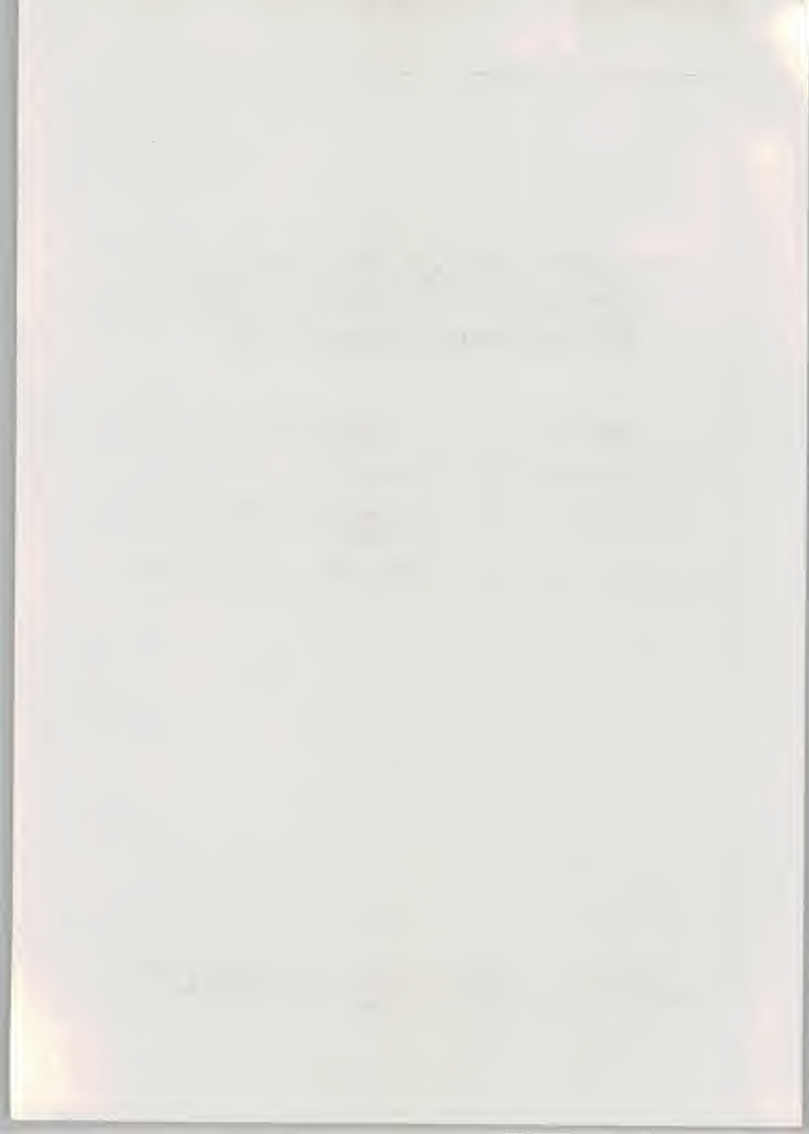
- Major organizations
- Industries undergoing radical change
- Companies with highly distributed operations



7

Systems Integration, Western Europe Strengths and Weaknesses of Management Consultancies

| Strengths | Weaknesses |
|--------------------------------------|---------------------------------------|
| High-calibre personnel | Expensive |
| Credibility with user top management | Sometimes overrun cost and timescales |
| Business consultancy skills | Looking for repeat business |



Systems Integration, Western Europe Strengths and Weaknesses of Major Equipment Vendors

| Strengths | Weaknesses |
|------------------------|---|
| Stability | Business consultancy skills |
| High-calibre personnel | Lack of proven track record |
| Account management | Lack of independence |
| | Lack of development expertise/resources |

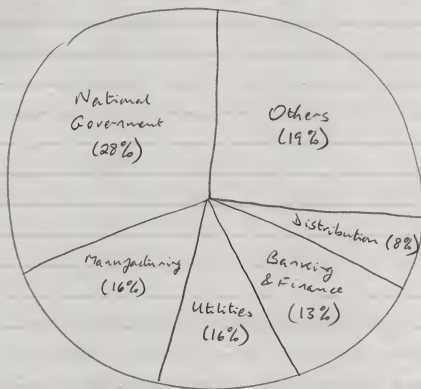


Systems Integration, Western Europe Strengths and Weaknesses of Professional Services Vendors

| Strengths | Weaknesses |
|---------------------------------|---------------------------------------|
| Relationship with IS management | Business consultancy skills |
| Project management skills | Perceived technical orientation |
| Implementation/technical skills | Lack of access to user top management |



Industry Market Opportunities
Systems Integration, Western Europe



1990 Total Market = \$2.5 Billion

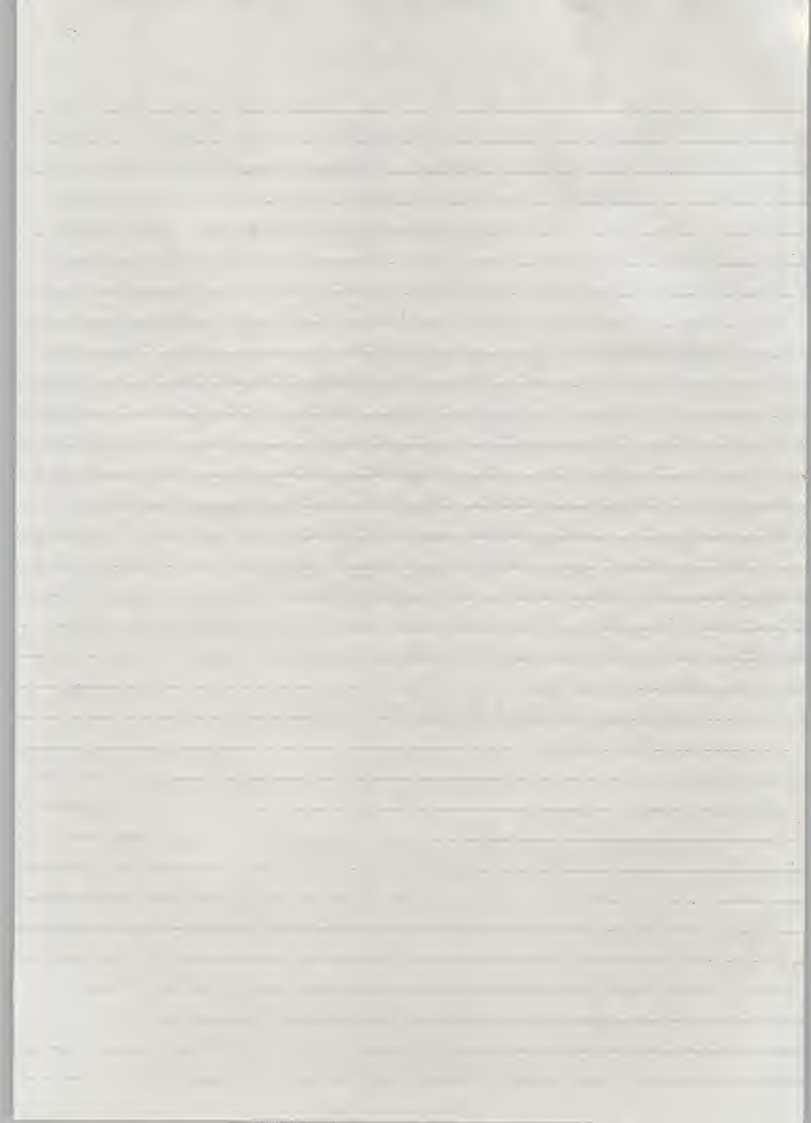
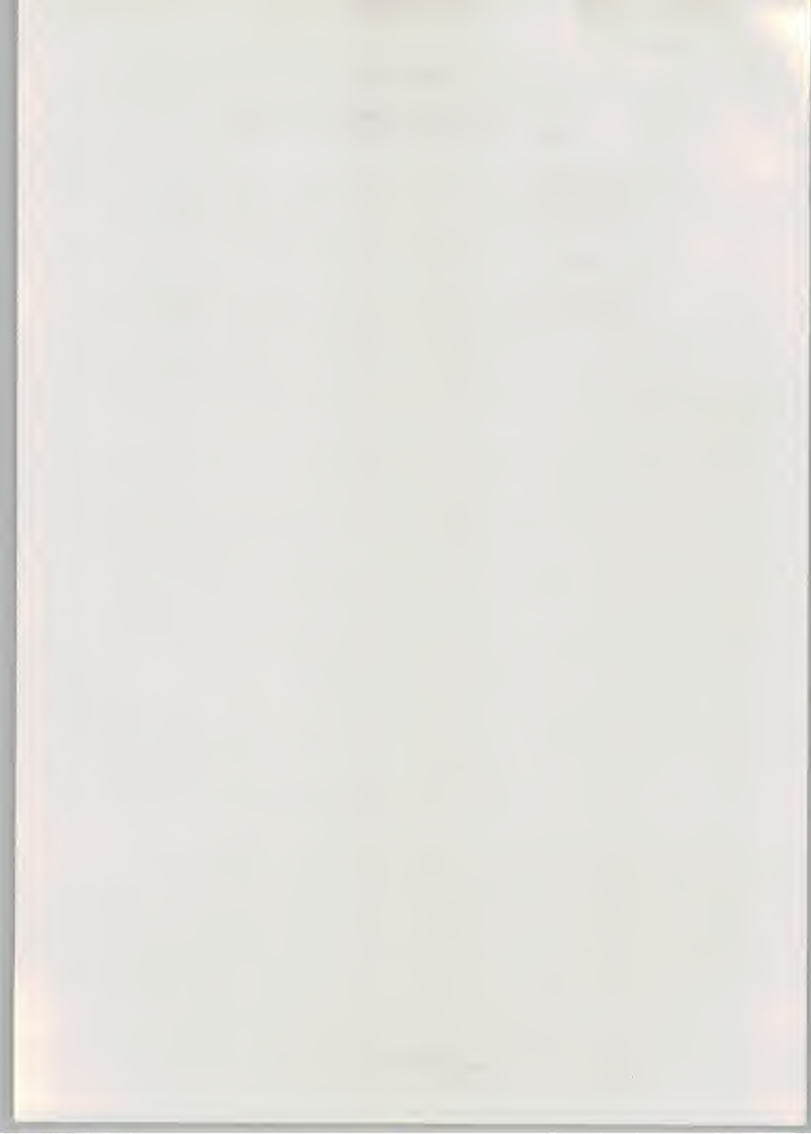


Exhibit VI-3

**Importance in Buying Process
Computer Integrated Manufacturing, Western Europe**

| User Personnel | Degree of Importance |
|--------------------------|----------------------|
| Top management | High |
| Manufacturing management | Medium - High |
| IS management | Medium - High |



(12)

Exhibit VI-4

Importance in Lead Generation
Computer Integrated Manufacturing, Western Europe

| <div> <div>Vendor Category</div> <div>Means of Lead Generation</div> </div> | Equipment Vendors | Professional Services Vendors | Application Software Product Vendors |
|---|-------------------|-------------------------------|---|
| Account Managers | High | Medium | High |
| New Business Sales Force | Medium | High | High |
| Collaboration Partners | Medium | High | Medium |
| External Consultants | Low | Medium | High |

(13)

~~Appendix 11-16~~Vendor Issues: ~~Cooperation~~ *Alliances*

- *and*
~~IBM & Coopers & Lybrand~~
- IBM Approved Industrial Systems Integrators
- Cincom "CIM Alliance" Programme
- ~~Siemens and Lucas E & S~~
- ASK and EDS
- ~~Sligos and Mesarteam~~



Vendor Challenges Systems Integration, Western Europe

~~Business Consulting~~

- * Access to key decision makers

- * Integration architecture

- * Building key partnerships

~~Business Consulting~~

- * Open systems & product branding

- * Profitability

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P. 1

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Change ~ \$40M to Read: ~ \$44.75

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TITLE PAGE

presentation (4).

Nouvelles Opportunités autour
de la Maintenance des
Logiciels Internes

Style like
presentations
1, 2, & 3

Roger Fulton

Consultant

the 1990s, the number of people in the UK who are aged 65 and over has increased from 10.5 million to 12.5 million, and the number of people aged 75 and over has increased from 4.5 million to 6.5 million (Office of National Statistics 2000).

There is a growing awareness of the need to address the needs of older people in the community. The Department of Health (1999) has published a strategy for older people, which sets out the government's commitment to older people and the actions that will be taken to improve their lives. The strategy is based on the following principles:

- Older people should be able to live independently and actively in the community.
- Older people should be able to access the services and support they need.
- Older people should be able to participate in the decisions that affect their lives.

The strategy also sets out a number of key objectives, including:

- To improve the health and well-being of older people.
- To improve the quality of life of older people.
- To improve the opportunities for older people to participate in the decisions that affect their lives.

The strategy is a key document for the development of services for older people in the UK. It provides a framework for the development of services and for the evaluation of their effectiveness. It also provides a basis for the development of policies and for the allocation of resources.

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weheads.

SLIDES FOR PARIS SEMINAR
31st MAY 1991

①.

Derived from ME-SM1 Exec Summary,

ME-SM1

EXH II-1

✓

Operational Software Support (Software Maintenance)

- Support and maintenance of in-house developed software
 - Two-thirds of all software activity
 - Today the smallest outsourced sector
- Largest services opportunity of the 1990s
- Centred on management issues

ME-SM1 Exhibit II-1

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Note to graphics: please follow exhibit numbers on left hand side of page. Ignore the ones underneath the slides here.

Categories of Software by Source

- Class A In-house developed
- Class B Custom/contracted
- Class C Application products
- Class D System products

II-2

ME-SM1 Exhibit II-2

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INPUT

the 1990s, the number of people in the UK who are aged 65 and over has increased by 1.5 million (1990–2000) and is projected to increase by a further 1.5 million by 2020 (Office for National Statistics 2001). The number of people aged 65 and over is projected to increase from 10.5 million in 1990 to 12.5 million in 2020.

There is a growing awareness of the need to develop strategies to meet the needs of the ageing population. The Department of Health (2000) has identified the need to develop a 'new paradigm' for the care of the elderly, one that is based on the principles of 'active ageing' and 'positive ageing'. The Department of Health (2000) has identified the need to develop a 'new paradigm' for the care of the elderly, one that is based on the principles of 'active ageing' and 'positive ageing'. The Department of Health (2000) has identified the need to develop a 'new paradigm' for the care of the elderly, one that is based on the principles of 'active ageing' and 'positive ageing'.

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II-3

Software Maintenance Definitions

- Product Vendor
 - Fixing faults in software product
- Services Vendor
 - Keeping each client happy
- IS Management
 - Everything done after software goes live

ME-SM1 Exhibit II-3

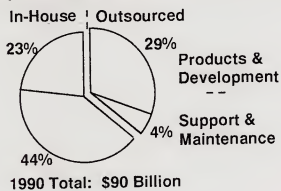
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New Slide

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European User Software Budgets



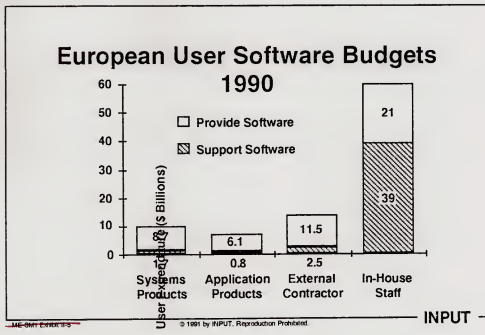
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H-6
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User Case Study - Government Sector

Problem - Operational Software Support

- Improve user service / lower costs

Solution - Outsourcing

Benefits

- >50% cost saving on staff ~\$70K p.a.
- 8 full-time staff replaced by 4 part-time
- System life extended 5 years

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Act 1983, 1990).

There is a growing awareness of the need to address the needs of people with mental health problems, and the importance of providing them with appropriate services. This has led to a number of initiatives, including the development of mental health services, the establishment of mental health trusts, and the implementation of the Mental Health Act 1983. The aim of these initiatives is to improve the lives of people with mental health problems, and to ensure that they receive the care and support they need.

One of the key challenges in providing mental health services is the need to address the needs of people with different types of mental health problems. This requires a range of services, including community mental health teams, inpatient services, and crisis services. The aim is to provide a range of services that meet the needs of people with different types of mental health problems, and to ensure that they receive the care and support they need.

Another key challenge is the need to address the needs of people with mental health problems who are at risk of harm to themselves or others. This requires a range of services, including crisis services, inpatient services, and community mental health teams. The aim is to provide a range of services that meet the needs of people who are at risk of harm, and to ensure that they receive the care and support they need.

One of the key challenges in providing mental health services is the need to address the needs of people with mental health problems who are at risk of harm to themselves or others. This requires a range of services, including crisis services, inpatient services, and community mental health teams. The aim is to provide a range of services that meet the needs of people who are at risk of harm, and to ensure that they receive the care and support they need.

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II-14

User Case Study - Telecommunications Sector

Problem - Operational Software Support

- Free-up staff & improve user service

Solution - Outsourcing

- Mix of in-house and 3rd-party staffing

Benefits

- 19 staff released for new projects
- Call-outs reduced ten-fold
- Working practices adopted by client

ME-SM1 Exhibit II-7

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II-15

Operational Software Support - Outsourcing Benefits

- Contracted quality of service for users
 - Better performance and reliability
 - Running costs known, and reducing
- In-house staff released for new projects
- IS operational efficiency improved
 - Improved operations practices
 - Proven management techniques

ME-SM1 Exhibit II-8

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the 1990s, the number of people in the UK who are aged 65 and over has increased by 1.5 million (1990–2000) and is projected to increase by a further 1.5 million by 2020 (Office for National Statistics 2001). The number of people aged 65 and over is projected to increase from 10.5 million in 1990 to 12.5 million in 2020, with the number of people aged 75 and over increasing from 4.5 million to 6.5 million in the same period.

There is a growing awareness of the need to address the health care needs of the ageing population. The Department of Health (2000) has identified the need to develop a new approach to health care for older people, one that is based on a partnership between the NHS, local authorities and the voluntary sector. The Department of Health (2000) has also identified the need to develop a new approach to health care for older people, one that is based on a partnership between the NHS, local authorities and the voluntary sector.

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II-18

Operational Software Support - Service Vendor Opportunities

- Support and maintenance contract
 - User service levels
 - Hand-over staffing and timing
- Emergency services
- Software maintenance/enhancement
- Procedures/methods enhancement
- Management control and reporting

ME-SM1 Exhibit II-9

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II-19

Operational Software Support - Product Vendor Opportunities

- Management tools:
 - User service levels
 - IS resources
 - Software
- Software engineering tools:
 - CASE tools, whole life-cycle
 - Reverse, re-engineering, conversion

ME-SM1 Exhibit II-10

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Conclusions

- Operational software support services
 - Un-tapped market opportunity
 - Total user spend ~\$40M
 - Less than 1% is outsourced
- Primary need is IS management skills rather than software engineering tools
- Natural fit in the systems operations market
- Strong vendor marketing is needed



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**Rappel des Domaines
d'Intervention
et d'Analyses d'INPUT**

Sylvie Bénech

INPUT

Application Domains
of
Dimensional
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Sylvia S. Smith

INPUT

INPUT

Logo ®
will be
replaced
here

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THINK

It reads
to be
enough
and

THINK

INPUT Etude, Analyse, Conseille

- I** Industrie des Logiciels ^{et} ~~and~~ Services
- N** Numération, Evaluation des Marchés
- P** Prestations, Segmentation de l'Offre
- U** Utilisateurs, leurs Motivations ^{et} ~~and~~ Attentes
- T** Tendances d'Evolution, Anticipations

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INPUT BLOCKS, ANALYSIS, CONCEPTS

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3. Input data and analysis

4. Input data and analysis

5. Input data and analysis

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Extra page -

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See what is
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N ↖ Numération, Evaluation des Marchés
P ↖ Prestations, Segmentation de l'Offre
U ↖ Utilisateurs, leurs Motivations ^{et} ~~and~~ Attentes
T ↖ Tendances d'Evolution, Anticipations

INPUT

THEORY, ANALYSIS, AND DESIGN

THEORY OF THE

ANALYSIS OF THE

DESIGN OF THE

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ANALYSIS OF THE

LOGICIELS ET SERVICES

Industrie des Services liés ~~aux Technologies de~~ l'Information

Nombreux sont les acteurs ...



Industry as a Strategic Management Environment

Industry as a Strategic Management Environment



Industry as a Strategic Management Environment

Numération ^{et} Evaluation du Potentiel des Marchés

X

leave
one extra
for solution

- \$ Dépense finale des utilisateurs
- \$\$ Analyse des marchés non-captifs
- \$\$\$ Matériels exclus sauf en cas d'intégration
- \$\$\$\$ Europe—13 pays, USA, Japon, Monde

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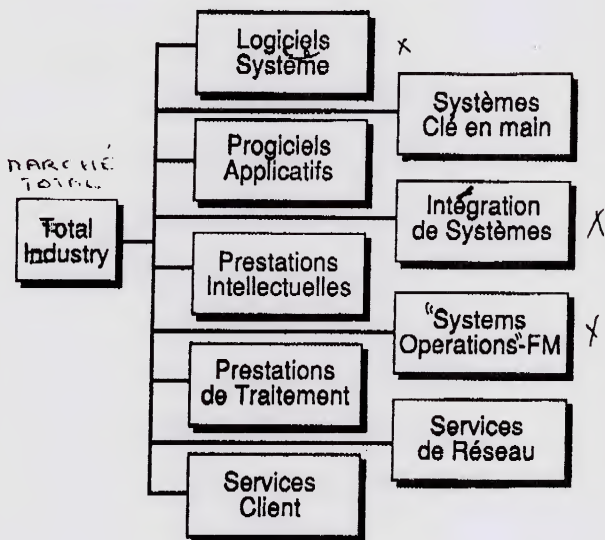
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Validation and Evaluation of Patient Self-Reports

1. Deyoung, M. J. (1990). *Validation and Evaluation of Patient Self-Reports*. New York: Springer-Verlag.
2. Deyoung, M. J. (1991). *Validation and Evaluation of Patient Self-Reports*. New York: Springer-Verlag.
3. Deyoung, M. J. (1992). *Validation and Evaluation of Patient Self-Reports*. New York: Springer-Verlag.
4. Deyoung, M. J. (1993). *Validation and Evaluation of Patient Self-Reports*. New York: Springer-Verlag.

Prestations Offertes et Segmentation des Marchés

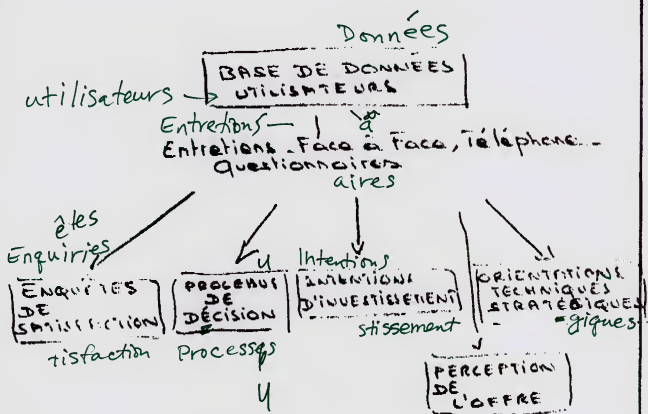


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Prozess der Mensch-Computer-Interaktion



Utilisateurs, Leurs Motivations, Leurs Attentes et



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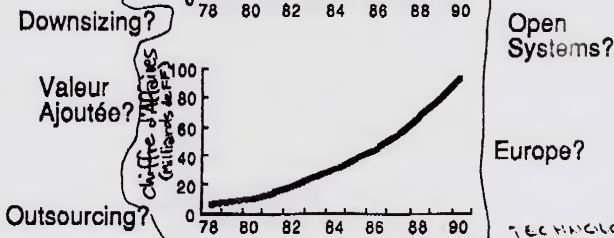
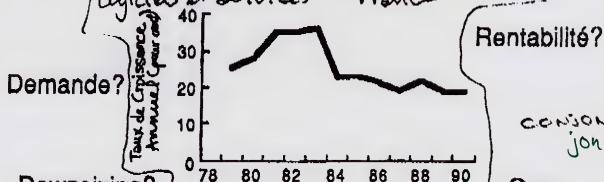
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University of International Law



Tendances d'Evolution des Marchés

Croissance 1978-1990 de l'Industrie des Logiciels et Services — France



Outsourcing? Concurrence? Acquisitions?

So it's possible to get it even small with a frame.

INPUT

AMMKT-PL-8

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Evolution of the Mammals

1. The first mammals appeared in the Permian period, about 260 million years ago.

2. They were small, shrew-like animals, about the size of a mouse.

3. They lived in the forests of the Permian period, where they ate insects and small plants.

4. Over time, they evolved into larger animals, some of which became the ancestors of modern mammals.

5. The evolution of mammals was a long and complex process, involving many different species and environments.

6. Today, mammals are found in almost every part of the world, from the Arctic to the tropics.

7. They are a diverse group of animals, with many different species and adaptations.

8. The study of mammal evolution helps us understand the history of life on Earth and the relationships between different species.

9. It also helps us understand the importance of conservation and the need to protect our planet's biodiversity.

10. The evolution of mammals is a fascinating story that continues to unfold as we learn more about the history of life on Earth.

11. The evolution of mammals is a testament to the power of natural selection and the ability of life to adapt and survive.

12. The evolution of mammals is a story of survival, adaptation, and the triumph of life over adversity.

13. The evolution of mammals is a story that reminds us of the resilience of life and the importance of protecting our planet.

14. The evolution of mammals is a story that inspires us to explore the mysteries of the natural world and to seek out the truth.

15. The evolution of mammals is a story that shows us the beauty and wonder of life and the power of the natural world.

16. The evolution of mammals is a story that reminds us of the importance of science and the need to protect our planet.

17. The evolution of mammals is a story that shows us the power of life and the ability of nature to create something beautiful and new.

18. The evolution of mammals is a story that reminds us of the importance of our planet and the need to protect it for future generations.

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DATE: 22 May 91

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Project Charge Code: ALFRE

FILE: CHRON CONTACT OTHER

Specify: _____



TITLE PAGE
présentation (1).
(to follow - from Sylvie).

Rappel des Domaines d'Intervention
et d'Analyses d'INPUT

Sylvie Bénéch

Directeur INPUT France.



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52, boulevard de Sébastopol, 75003 Paris Tel. (33-1) 42 77 42 77
Telex 218 495F Fax (33-1) 42 77 85 82

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FAX NUMBER: _____

ATTENTION: Andrea.

NUMBER OF PAGES: 1 of 10

CONFIDENTIAL CORRESPONDENCE: Yes _____ No _____

URGENT: Yes ✓ No _____

DESCRIPTION: 31 May Conference.

- ① Here is my presentation as announced
by Coupo.
I apologize as page 6 is not completed
I'll fax it to you tomorrow.
Don't hesitate to call me if problems.
Thanks to follow, same format as other spreads
- ② About INPUT - New French text.
You can cancel definitely the old version.
Thanks for your help - Regards. SPB.

FROM: Sylvie BENEUT

DATE: 22/05/91.

INPUT: _____

Project Charge Code: _____

TUSM

THE UNIVERSITY OF THE SOUTH MEDITERRANEAN
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THE DEAN OF THE FACULTY OF

SCIENCE

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SCIENCE

UNIVERSITY OF THE SOUTH MEDITERRANEAN

TUNIS

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②

INPUT ETUDIE, ANALYSE, CONSEILLE.....

- I** Industrie des Logiciels & Services
- N** Numération, Evaluation des Marchés
- P** Prestations. Segmentation de l'Offre
- U** Utilisateurs. Leurs Motivations & Attentes
- T** Tendances d'Evolution, Anticipations

Deutsche Gesellschaft für
die Erforschung der
Geschichte der
Sprache und der
Literatur
Berlin

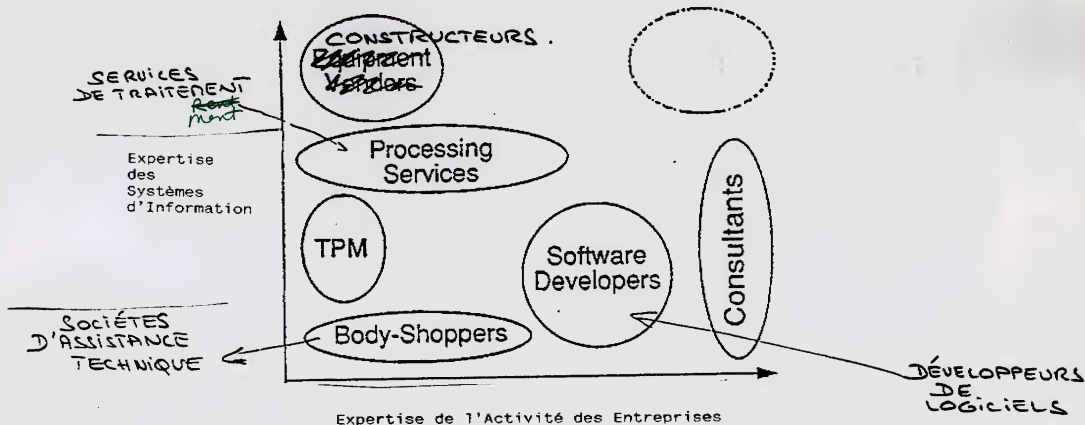
Dr. phil. habil. Dr. phil. Dr. phil. Dr. phil.

— 1919 —

INPUT

II. Industrie des Services liés aux Technologies de l'Information

Nombreux sont les acteurs....
eux



University of
TUM

University of TUM



INPUT

N... Numération & Evaluation du Potentiel des Marchés

- \$ Dépense finale des utilisateurs
- \$\$ Analyse des marchés non-captifs
- \$\$\$ Matériels exclus sauf en cas d'intégration
- \$\$\$\$ Europe - 13 pays, U.S.A, Japon, Monde

U.S.A.,

101
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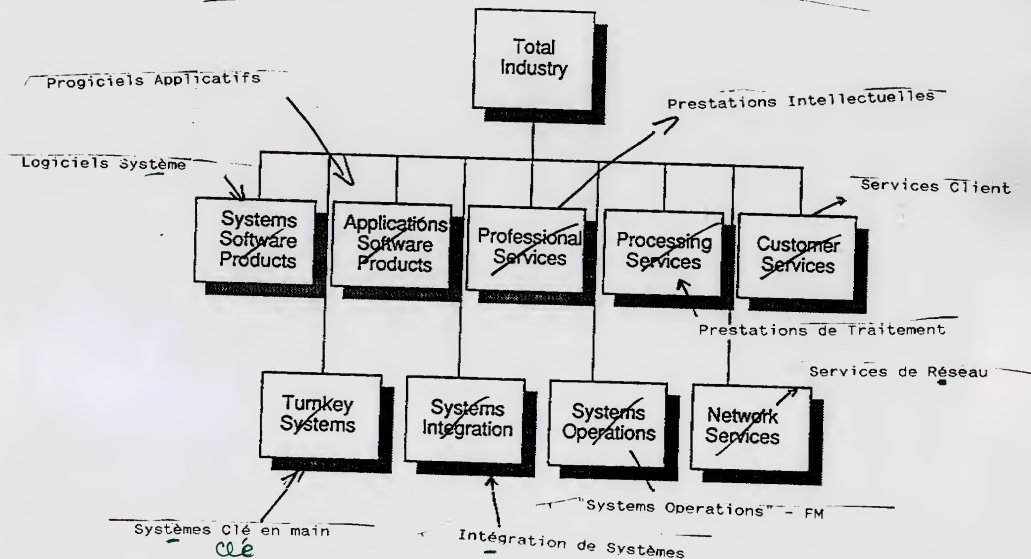
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P..... Prestations Offertes et Segmentation des Marchés

INPUT



IMNT



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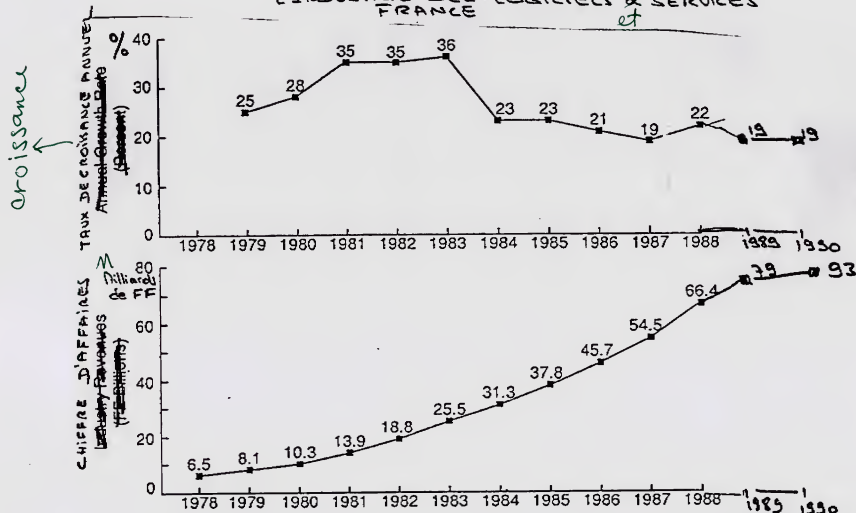
V..... Utilisateurs, leurs motivations, leurs attentes

Not ready
To be sent on 23/05.
Therese

INPUT

..... Tendances d'Evolution des Marchés

CROISSANCE 1978-1990 DE
L'INDUSTRIE DES LOGICIELS ^{et} SERVICES



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For slide ⑦ if possible to get the final ⑦bis format as below....



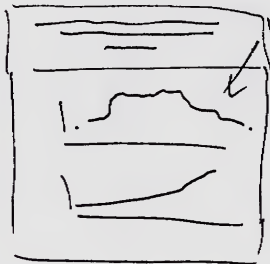
INPUT

^M
DEMANDE ?

DOWNsizing ?

VALEUR AJOUTÉE ?
Valeur Ajoutée

OUTsOURCING ?



Very small.

RENTABILITÉ ?
rentabilité

OPEN SYSTEMS ?

EUROPE ?

ACQUISITIONS ?

CONCURRENCE ?

INPUT

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ATTENTION: Andréa

NUMBER OF PAGES: 1 of 8

CONFIDENTIAL CORRESPONDENCE: Yes

No ☒

URGENT: ☒ Yes ☐ No

DESCRIPTION: ① PAC speech on May 31.

- Please find attached PAC presentation Carol
asked me to prepare Friday evening.
I hope you will have time to prepare and
ship it. Final format is without binder just
with a stappled. If you could include also
French presentation + A propos d'INPUT
Quantity requests: 30. We will do here add on copies.
② Labels. We need to receive 50 white
labels for badges. Please send it also.

Thanks for your help

872

FROM: Sylvie B.

DATE: 28-05-91

INPUT:

Project Charge Code:

CHANGE OF ADDRESS
Effective on 6 June 1991. Please note our new address :
INPUT France
24, av. du Recteur Poincaré
75016 PARIS
Tél (33-1) 46 47 65 65 Fax (33-1) 46 47 69 60

TO THE

MEMBERS OF THE BOARD OF DIRECTORS

OF THE

AMERICAN RED CROSS

WASHINGTON, D. C.

DEAR MR. BOARD:

I have the honor to acknowledge the receipt of your letter of the 10th inst.

and in reply to inform you that the same has been forwarded to the proper authorities for their consideration.

I am, Sir, very respectfully,
Yours,
Very truly,
J. H. [Signature]

Enclosed for you are two copies of the report of the Committee on the subject of the proposed amendment to the Constitution of the American Red Cross, which was adopted by the Board of Directors at its meeting on the 10th inst.

I am, Sir, very respectfully,
Yours,
Very truly,
J. H. [Signature]

I have the honor to acknowledge the receipt of your letter of the 10th inst.

and in reply to inform you that the same has been forwarded to the proper authorities for their consideration.

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I am, Sir, very respectfully,
Yours,
Very truly,
J. H. [Signature]



INPUT
CONFERENCE du 31 Mai 1991.

Peter A. Cunningham.
President

INFORMATION SYSTEMS MANAGEMENT
BY OUTSOURCING.

Hôtel Royal Monceau
Paris

புதுச்சேரி
 (28) 27.12.2020 திருவிழா
 கலாநாயகர் க. பி. சிவசுந்தரன்

தமிழக அரசு கல்வித் துறை
 கல்வி அமைச்சர்

புதுச்சேரி கல்வித் துறை
 கல்வி அமைச்சர்

1

Outsourcing represents
the future of the
information services
industry

00-4

INPUT

8

"Outsourcing" vs. Buying
Services

1980s: Services achieved
recognition

1990s: Overcome prejudice
against buying management
services

00-10

INPUT

10

Outsourcing in the 1990s
What is Different

- Size and length of commitment
- Breadth of responsibility
assumed by vendor
- Partnership versus
supplier/subcontractor

00-10

INPUT

19

Outsourcing in the 1990s
What is Different

- Complexity of IT solutions
- Professional services component
- Systems management

00-08

INPUT

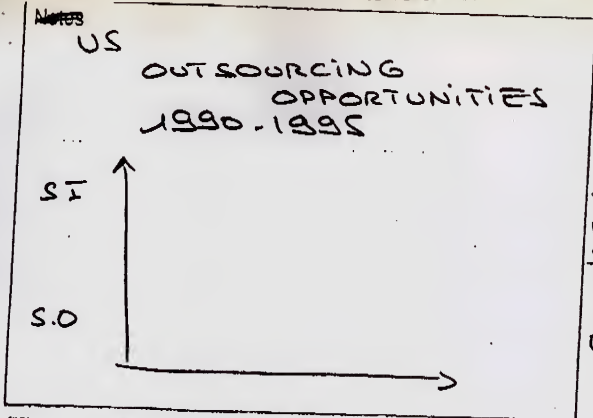
20

1. *Staphylococcus aureus*
Gram positive cocci
arranging in clusters
/ chains

2. *Streptococcus pyogenes*
Gram positive cocci
arranging in chains
/ pairs
/ groups
/ tetrads
/ chains
/ pairs
/ groups
/ tetrads

3. *Streptococcus pneumoniae*
Gram positive cocci
arranging in pairs
/ chains
/ tetrads
/ groups
/ pairs
/ groups
/ tetrads

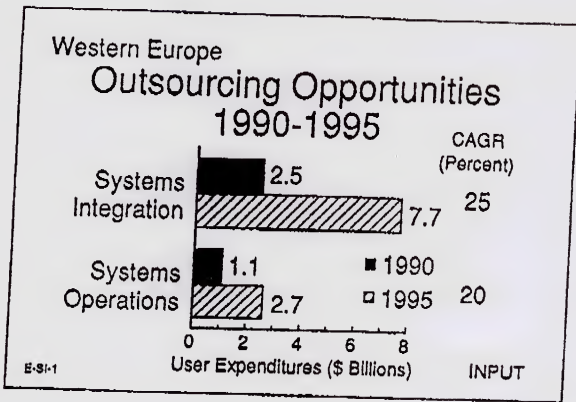
4. *Streptococcus lactis*
Gram positive cocci
arranging in chains
/ pairs
/ groups
/ tetrads



Andrea
 < could
 you ask
 the research
 to provide
 you
 equivalent
 figures
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 ones for
 US.

4/1/81

4/1/81 E-OU-1



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(3)

Systems Operations, Western Europe

Market Forecast

| Country | \$ Millions | | | |
|---------|-------------|------|----------|------|
| | 1990 | 1991 | CAGR (%) | 1995 |
| France | 297 | 353 | 19 | 713 |
| Germany | 75 | 87 | 18 | 169 |
| U.K. | 301 | 371 | 23 | 832 |
| Italy | 150 | 182 | 22 | 400 |

E-SO-5

INPUT

Notes

SYSTEMS INTEGRATION, WESTERN EUROPE

MARKET FORECAST

| Country | US\$ \$ millions | | | | |
|----------------|-----------------------------|------|------|-------|--------------------------------------|
| | 1989 | 1990 | 1991 | 1995 | 1995
CAGR
(Percent) |
| France | 440 | 560 | 715 | 1,830 | 27 |
| Germany | 785 | 610 | 775 | 1,930 | 26 |
| United Kingdom | 505 | 625 | 770 | 1,770 | 23 |
| Italy | 180 | 230 | 300 | 760 | 27 |

Int'l

E-SI-23

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INPUT

Page 2 of 2

Market Forecast

| Market Forecast | | | |
|-----------------|----|----|----|
| Year | Q1 | Q2 | Q3 |
| 2017 | 10 | 15 | 20 |
| 2018 | 15 | 20 | 25 |
| 2019 | 20 | 25 | 30 |
| 2020 | 25 | 30 | 35 |

Market Forecast for 2017-2020

Market Forecast

| Market Forecast | | | |
|-----------------|----|----|----|
| Year | Q1 | Q2 | Q3 |
| 2017 | 10 | 15 | 20 |
| 2018 | 15 | 20 | 25 |
| 2019 | 20 | 25 | 30 |
| 2020 | 25 | 30 | 35 |

4

Outsourcing Vendors

- Approaches differ greatly
- Variety of capabilities needed
- Partnerships/alliances result

INPUT

Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|-------------------------|---|
| Partnership-Based | Applications Management | Management-oriented
Broad scope
Open-ended timing |

INPUT

Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|----------------------|---|
| Partnership-Based | Systems Operations | Broad expertise
Personnel transfer
Flexible agreement
Service levels |

INPUT

Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|-----------------------|---|
| Objective-Based | Transition Management | Project-oriented
Specific scope
Specific timing |

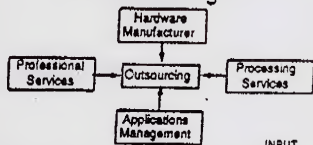
INPUT

Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|--------------------------|---|
| Objective-Based | Applications Maintenance | Specific expertise
Focused agreement
Target dates |
| | Systems Integration | |

INPUT

Vendor Orientation to Outsourcing



INPUT

12/13/90

5

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INPUT

Company Vehicle

1. Vehicle
2. Make
3. Model
4. Year
5. License
6. VIN

Minimum Requirements

1. Driver's License
2. Insurance
3. Safety
4. Maintenance

Company Vehicle Policy

1. Use
2. Fuel
3. Maintenance
4. Insurance
5. Safety
6. Compliance

Company Vehicle Policy

1. Use
2. Fuel
3. Maintenance
4. Insurance
5. Safety
6. Compliance

Company Vehicle Policy



Company Vehicle Policy

1. Use
2. Fuel
3. Maintenance
4. Insurance
5. Safety
6. Compliance

(5)

1 →

Organizational Impacts

| Group | Impacts |
|--------------------|--|
| Total Organization | No visible impact
Reallocation of personnel
Faster access to skills
More disciplined implementation |

OU-34

INPUT

36

5

Organizational Impacts

| Group | Impacts |
|--------------------------------|---|
| Information Systems Management | Manage a smaller organization
Shift to tactics and strategy
Time available for planning |

37
INPUT

C

Organizational Impacts

| Group | Impacts |
|----------------------------------|---|
| Information Systems Professional | Significant initial anxiety
Greater career opportunities |

38
INPUT

D

Conclusions User View

- Outsourcing is different for the 1990s
- Outsourcing offers new opportunities
- Outsourcing can lead to faster response
- Outsourcing can help IS change its role

INPUT

39

Optimization of the Process

| Parameter | Value |
|-------------|--------|
| Temperature | 150 °C |
| Time | 2 h |
| Pressure | 10 bar |
| Flow rate | 10 L/h |

Optimization of the Process

| Parameter | Value |
|-------------|--------|
| Temperature | 150 °C |
| Time | 2 h |
| Pressure | 10 bar |
| Flow rate | 10 L/h |

Optimization of the Process

| Parameter | Value |
|-------------|--------|
| Temperature | 150 °C |
| Time | 2 h |
| Pressure | 10 bar |
| Flow rate | 10 L/h |

Optimization of the Process

| Parameter | Value |
|-------------|--------|
| Temperature | 150 °C |
| Time | 2 h |
| Pressure | 10 bar |
| Flow rate | 10 L/h |

(6)

INPUT.

Andrea, please add after this page
my presentation - starting with
INPUT étude, analyse, conclusion...

...

=> 6 pages.

+ at the End: About Input sheet.

—

E-MS-3

12

TOSHI

1. The first thing I noticed when I stepped out of the plane was the cold. It was a sharp contrast to the warm, humid air of the tropics. I shivered slightly, pulling my jacket closer.

2. The second thing I noticed was the silence. It was a heavy, oppressive silence that seemed to weigh down on my chest.

3. The third thing I noticed was the smell. It was a mix of old wood, dust, and something I couldn't quite identify. It was a strange, almost comforting scent.

4. The fourth thing I noticed was the view. It was a breathtaking sight, a vast expanse of white sand and turquoise water stretching out to the horizon.

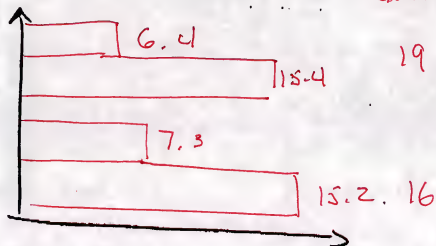
Notes

US

OUTSOURCING OPPORTUNITIES 1990-1995

CAGR

SI



S.O.

Andrea
could you ask the research to provide you equivalent figures than European ones for US.

5/1/91

00-

(\$ Billions)

User Expenditures

K

Western Europe

Outsourcing Opportunities 1990-1995

Systems

2.5

CAGR (Percent)



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Conférence du 31 Mai 1991
Peter A. Cunningham
President
Information Systems Management
by Outsourcing

Hôtel Royal Monceau

Paris

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Tel. (071) 493-9335
Tel. (33-1) 46 47 65 65
Tel. (0) 6447-7229



Outsourcing represents the future of the information services industry

OU-8

INPUT

Notes



"Outsourcing" vs. Buying Services

1980s: Services achieved recognition

1990s: Overcome prejudice against buying management services

OU-10

INPUT

Notes



Outsourcing in the 1990s What is Different

- Size and length of commitment
- Breadth of responsibility assumed by vendor
- Partnership versus supplier/subcontractor

OU-19

INPUT

Notes



Outsourcing in the 1990s

What is Different

- Complexity of IT solutions
- Professional services component
- Systems management

OU-20

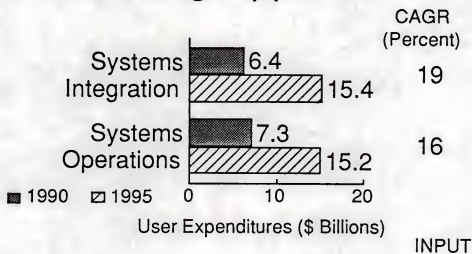
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Notes



U.S.

Outsourcing Opportunities



E-OU-1

Notes

5/28/91

PROCEEDINGS OF THE

ANNUAL MEETING OF THE

AMERICAN SOCIETY OF CLIMATE ENGINEERS

Held at the

Hotel New York, New York

December 1-3, 1964

Published by the

American Society of Climate Engineers

1111 Avenue of the Americas, New York 10020

Price \$1.00 per copy

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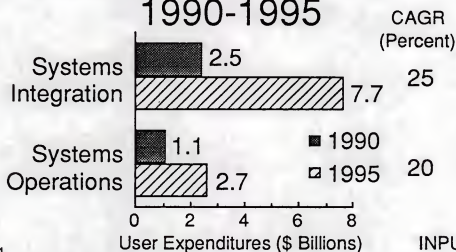
or from the American Society of Climate Engineers

1111 Avenue of the Americas, New York 10020

Western Europe

Outsourcing Opportunities

1990-1995



E-SI-1

Notes



Systems Operations, Western Europe

Market Forecast

| Country | \$ Millions | | | |
|---------|-------------|------|----------|------|
| | 1990 | 1991 | CAGR (%) | 1995 |
| France | 297 | 353 | 19 | 713 |
| Germany | 75 | 87 | 18 | 169 |
| U.K. | 301 | 371 | 23 | 832 |
| Italy | 150 | 182 | 22 | 400 |

E-SO-5

INPUT

Notes



Systems Integration, Western Europe

Market Forecast

| Country | 1990 | 1991 | CAGR
(%) | 1995 |
|---------|------|------|-------------|-------|
| France | 560 | 715 | 27 | 1,830 |
| Germany | 610 | 775 | 26 | 1,930 |
| U.K. | 625 | 770 | 23 | 1,770 |
| Italy | 230 | 300 | 27 | 760 |

E-SI-23

INPUT

Notes



Outsourcing Vendors

- Approaches differ greatly
- Variety of capabilities needed
- Partnerships/alliances result

OU-13

INPUT

Notes



Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|-------------------------|---|
| Partnership-Based | Applications Management | Management-oriented
Broad scope
Open-ended timing |

OU-26

INPUT

Notes

THE HISTORY OF THE CITY OF BOSTON

FROM THE FIRST SETTLEMENT TO THE PRESENT TIME
BY
JOSEPH NEALE, ESQ.
OF THE BARR

IN TWO VOLUMES.
THE FIRST VOLUME.
CONTAINING THE HISTORY FROM THE FIRST SETTLEMENT TO THE YEAR 1780.
LONDON: PRINTED BY J. JOHNSON, ST. PAULS CHURCH-YARD, 1780.

Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|----------------------|---|
| Partnership-Based | Systems Operations | Broad expertise
Personnel transfer
Flexible agreement
Service levels |

OU-27

INPUT

Notes

THEORY OF THE EARTH

BY J. H. VAN DIJK

The theory of the earth is a branch of geology which deals with the origin and development of the earth and its various parts. It is a science which seeks to explain the processes which have shaped the earth and its features. The theory of the earth is based on the study of the earth's history and its various parts. It is a science which seeks to explain the processes which have shaped the earth and its features. The theory of the earth is based on the study of the earth's history and its various parts.

The theory of the earth is a branch of geology which deals with the origin and development of the earth and its various parts. It is a science which seeks to explain the processes which have shaped the earth and its features. The theory of the earth is based on the study of the earth's history and its various parts. It is a science which seeks to explain the processes which have shaped the earth and its features. The theory of the earth is based on the study of the earth's history and its various parts.

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Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|-----------------------|---|
| Objective-Based | Transition Management | Project-oriented
Specific scope
Specific timing |

OU-28

INPUT

Notes



Outsourcing Relationship Classification

| Relationship Type | Outsourcing Category | Relationship Characteristics |
|-------------------|--------------------------|---|
| Objective-Based | Applications Maintenance | Specific expertise
Focused agreement
Target dates |
| | Systems Integration | |

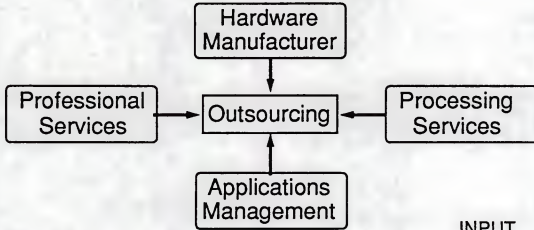
INPUT

OU-29

Notes



Vendor Orientation to Outsourcing



OU-30

INPUT

Notes



Organizational Impacts

| Group | Impacts |
|--------------------|--|
| Total Organization | No visible impact
Reallocation of personnel
Faster access to skills
More disciplined implementation |

OU-36

INPUT

Notes



Organizational Impacts

| Group | Impacts |
|--------------------------------|---|
| Information Systems Management | Manage a smaller organization
Shift to tactics and strategy
Time available for planning |

OU-37

INPUT

Notes



Organizational Impacts

| Group | Impacts |
|----------------------------------|---|
| Information Systems Professional | Significant initial anxiety
Greater career opportunities |

OU-38

INPUT

Notes



Conclusions User View

- Outsourcing is different for the 1990s
- Outsourcing offers new opportunities
- Outsourcing can lead to faster response
- Outsourcing can help IS change its role

INPUT

OU-39

Notes



INPUT

E-MS-3

Notes

5/28/91

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INPUT



**Domaines d'Intervention
et d'Analyse
d'INPUT**

Sylvie Bénech



INPUT

INPUT



INPUT Etudie, Analyse, Conseille

Industrie des Logiciels et Services

Numération, Evaluation des Marchés

Prestations, Segmentation de l'Offre

Utilisateurs, leurs Motivations et Attentes

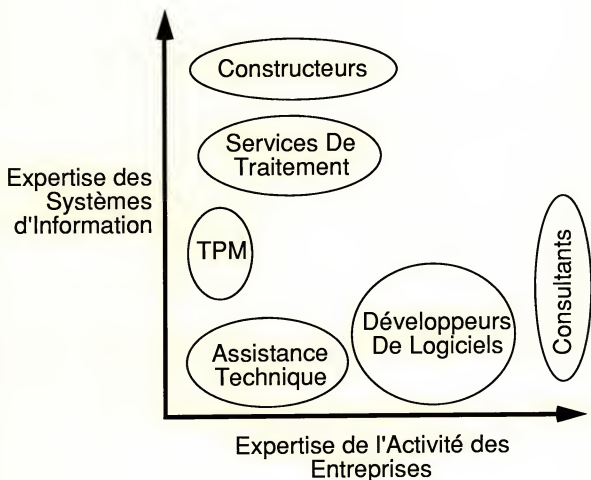
Tendances d'Evolution, Anticipations

INPUT



Industrie des Logiciels et Services

Nombreux sont les acteurs . . .



INPUT



Numération et Evaluation du Potentiel des Marchés

\$ Dépense finale des utilisateurs

\$\$ Analyse des marchés non-captifs

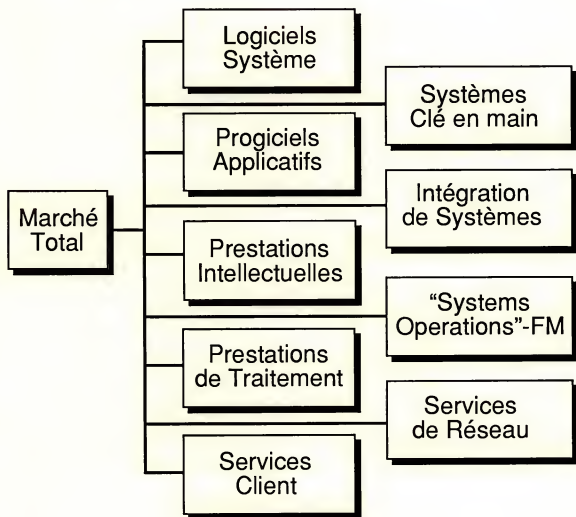
\$\$\$ Matériels exclus sauf en cas d'intégration

\$\$\$\$ Europe—13 pays, USA, Japon, Monde

INPUT



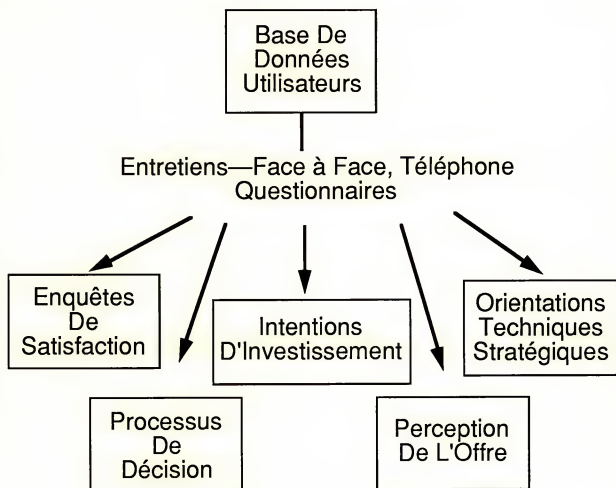
Prestations Offertes et Segmentation des Marchés



INPUT



Utilisateurs, Leurs Motivations et Attentes



INPUT



Tendances d'Evolution des Marchés

Demande?

Valeur Ajoutée?

Outsourcing?

Concurrence?

Downsizing?

Rentabilité?

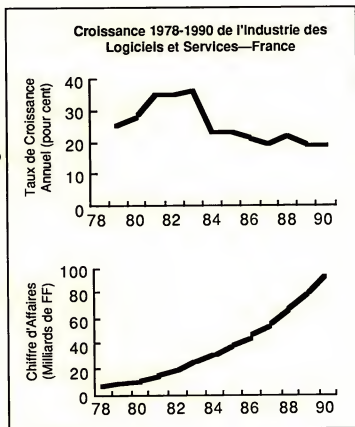
Conjoncture?

Open Systems?

Europe?

Technologies?

Acquisitions?



INPUT



A propos d' INPUT

INPUT, société Internationale, leader dans l'analyse des Marchés des Services liés aux Technologies de l'Information, délivre des études marketing et du conseil à l'ensemble des prestataires impliqués sur ces marchés.

Depuis sa création en 1974, INPUT analyse en permanence les différents segments du marché—prestations intellectuelles et de traitement, logiciels système et applicatifs, systèmes clé en main, services de réseau, services client, intégration de systèmes, FM—et leur pénétration par secteur vertical (banque, assurance, industrie, distribution).

Les interventions d'INPUT peuvent satisfaire des besoins d'informations opérationnels, tactiques et stratégiques (analyse de concurrence, attentes d'utilisateurs, potentiel de marché, recherche de partenaire...).

Les ressources d'INPUT sont accessibles sous forme de souscription à des programmes annuels, d'acquisition d'études multi-clients, de recherches spécifiques et confidentielles, de participation aux conférences spécialisées, d'abonnement à des newsletters.

La société compte plus de 100 personnes dans le monde dont une cinquantaine de consultants, experts sur les Marchés des Logiciels et Services.

INPUT bénéficie de références de clients notoires et parmi les plus importantes sociétés mondiales dont elle accompagne depuis de nombreuses années la croissance.

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